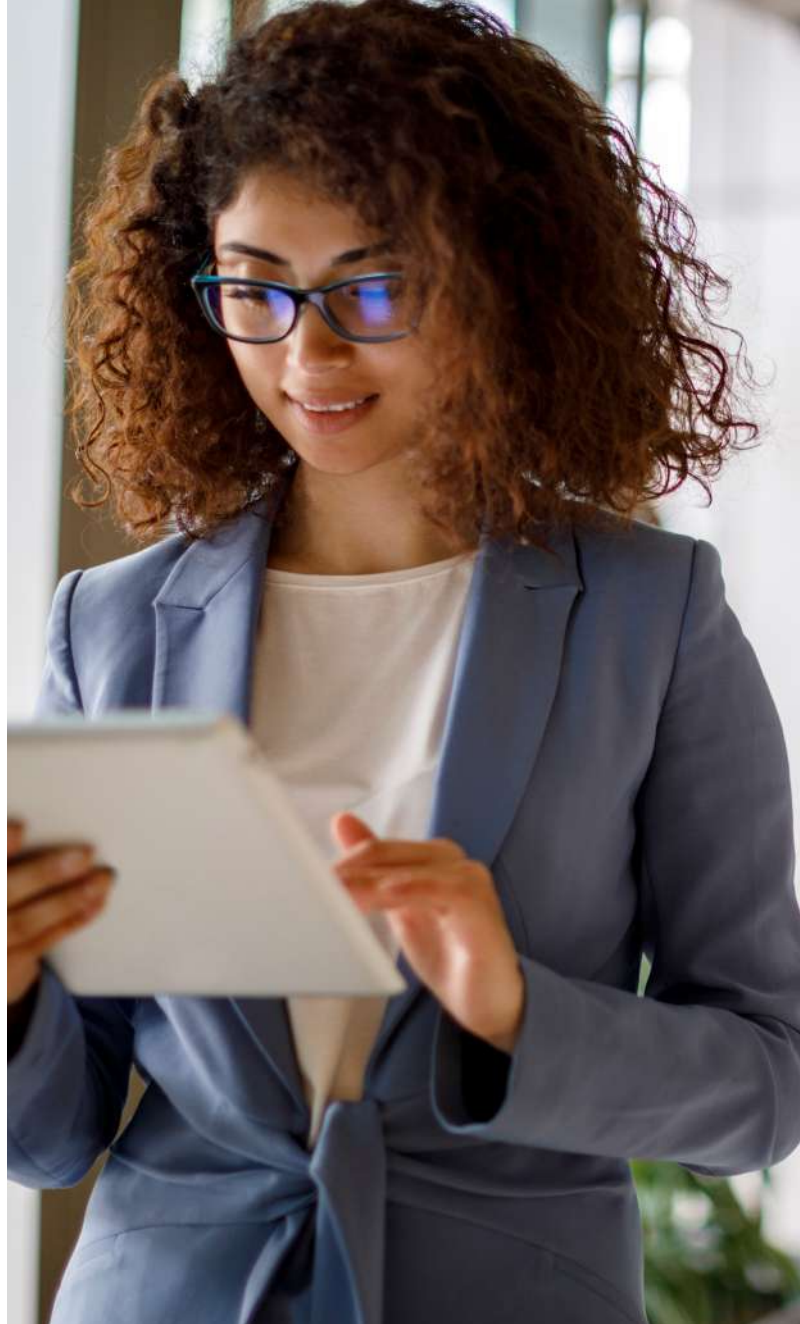


Five Case Studies to Inspire Your Intelligent Automation Strategy

How to Digitally Transform Your Operations End-to-End and Scale Across the Enterprise

KOFAX



“Very few enterprises have industrialized their automation initiatives. Nearly 90 percent of these organizations want to get there in the next two to three years. Kofax has taken this opportunity head on with its Intelligent Automation platform strategy, which promises to address this industrialization.”

Saurabh Gupta, Chief Strategy Officer, HfS Research

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Introduction

Across the business landscape, companies of all sizes are undergoing a digital transformation, harnessing technology to reinvent themselves, innovate and expand. And with the emergence of low-code solutions, technology has become even more accessible, empowering non-technical users to play a bigger role in the digital shift.

As digital transformation spreads throughout the organization, companies are setting their sights on digital workflow transformation (DWT) – optimizing and automating how employees execute tasks and workflows within traditionally complex business process.

Organizations that want to achieve DWT quickly should look to intelligent automation. Through document intelligence, process orchestration and connected systems, intelligent automation technology unleashes the full power of your workforce. It delivers the optimization and innovation required for true digital workflow transformation, creating a unified, powerful workforce of human and digital workers.

Discover the power of Kofax Intelligent Automation in these five inspiring case studies.



AMN Healthcare Uses Automation to Process Healthcare Workers' Timecards and Key Credentials

AMN Healthcare, working with business partner Genus Technologies, uses Kofax RPA™, Kofax TotalAgility™, Kofax Analytics for TotalAgility and Kofax Mobile Capture™ to automatically process healthcare workers' timecards and key credentials. Combined, these solutions ensure that their healthcare workers can fill "high needs" positions and receive their pay on time, while also reducing workload for the company's back-office staff—allowing them to focus on more value-add tasks.

Challenge

Doctors, nurses and healthcare professionals are the everyday heroes that power the US healthcare system. For medical providers, effectively coordinating the schedules of thousands of these professionals is a complex, time-consuming and mission critical activity.

Enter AMN Healthcare: the industry leader in US healthcare staffing. Headquartered in San Diego, California, and with offices across the US, AMN Healthcare operates nationwide to match freelance medical staff to healthcare vacancies, with a special focus on travel nursing.

Jeff Stratton, Senior Project Manager at AMN Healthcare, explained: "We help healthcare professionals find the work they need, whether on a contingent or permanent basis. In fact, a little over half our revenue comes from matching a workforce of around 8,000 travel nurses to 14-week long



"We found quick wins with Kofax RPA by automating high volume process steps. Timeliness and accuracy are now maximized, and our support staff can focus on shoring up other process areas."

Jeff Stratton, Senior Project Manager,
AMN Healthcare



ABOUT AMN HEALTHCARE
WWW.AMNHEALTHCARE.COM

Founded in 1985 and headquartered in San Diego, California, AMN Healthcare provides healthcare staffing solutions for medical facilities across the nation. The company also offers managed services programs and recruitment process outsourcing solutions that enable healthcare providers to reduce complexity, increase efficiency and improve patient outcomes.

PRODUCTS

- Kofax RPA™
- Kofax TotalAgility™
- Kofax Mobile Capture™
- Kofax Analytics for TotalAgility

PARTNER



WWW.GENUSLLC.COM

Genus Technologies is a software consulting company that helps organizations overcome the challenges they face automating content and related processes in the digitization of business operations and workforce tasks. Whatever the challenge, Genus makes the complex simple and helps our customers unlock and accelerate digital change.

FOCUS

- Robotic Process Automation
- Customer Uptime Improvements

assignments at healthcare facilities throughout the US. We connect these workers with open hospital vacancies, pay them for their labor, and then bill the hospitals for that labor.”

Ensuring that nurses are paid on time is one of the most important and time-intensive activities for

AMN Healthcare. Jeff Stratton said: “The hospitals and medical centers at which our nurses work give them time cards for hours completed, which they then file with us for payment. Once we receive those time cards, we check that the amount earned is correct and make sure our nurses receive their pay on time. This step is critical to keeping operations running smoothly and staff feeling looked-after, but to do this requires heavy-duty data processing.

“We estimated that we were processing around 4,000 of these timecards each week, which amounted to 8,000 hours annually. Over time, we found that the system we used for checking and processing timecards no longer delivered optimum efficiency—with the system prone to human error and occasionally crashing. Because of these inefficiencies, around 200 timecards would go missing each year.

“Lost time cards represent a huge risk for us, as we are liable to provide back payments and could even face legal action. To mitigate these risks, we set out to develop a more efficient way of paying our clinicians in full and on time for the vital work they do.”

“Since adopting Kofax solutions, we have reduced the time spent processing timecards by up to 68%, cutting the number of man hours required to complete this task from 8,000 to just 2,600.”

Jeff Stratton, Senior Project Manager, AMN Healthcare



Solution

AMN Healthcare decided to automate its timecard processing activities using the Kofax RPA™ platform alongside Kofax TotalAgility™, Kofax Analytics for TotalAgility™ and Kofax Mobile Capture™, integrated with AMN Healthcare's in-house application for timecard filing. Working with its business partner, Genus Technologies, AMN Healthcare was able to radically transform this essential business process.


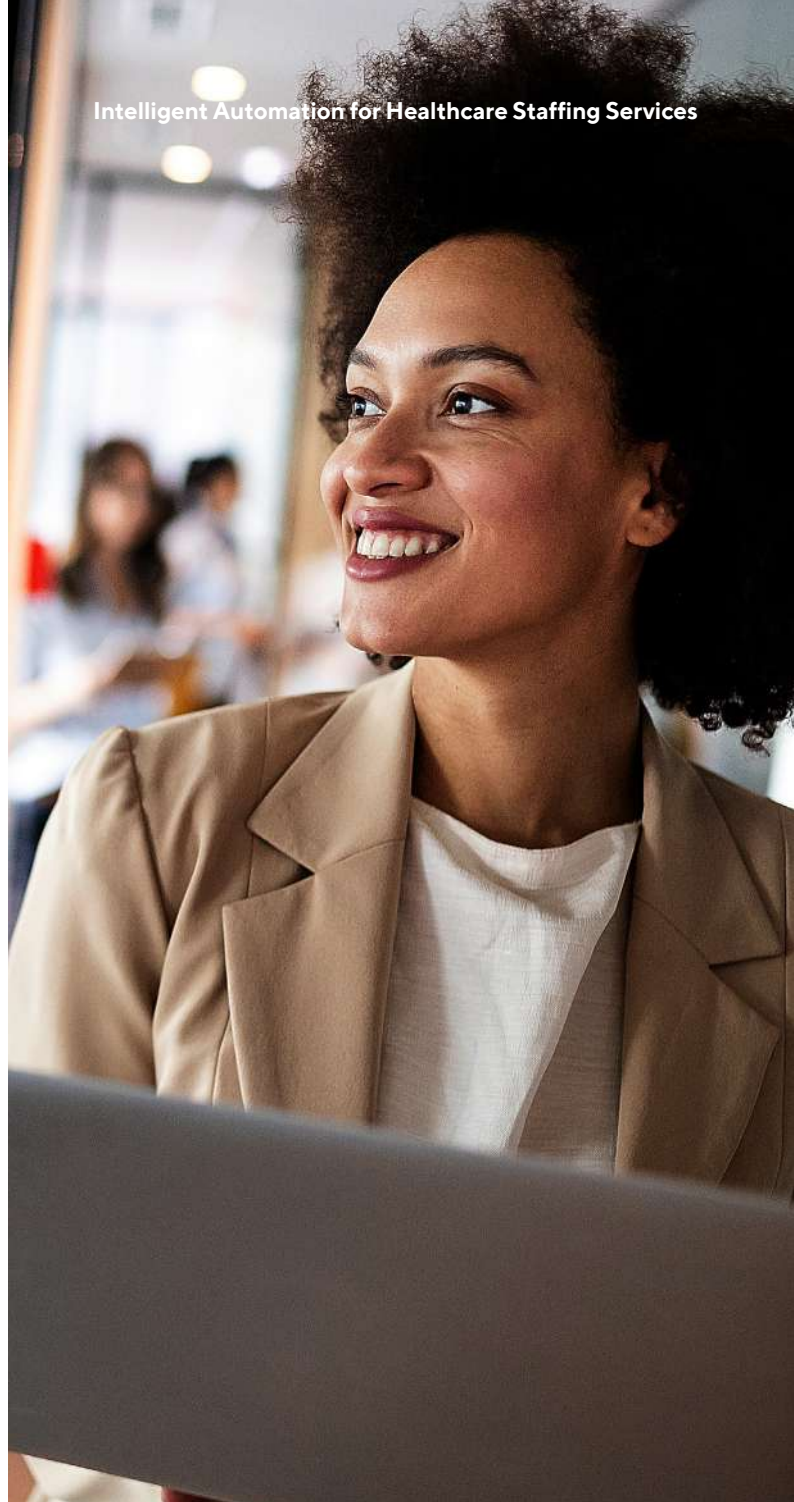
"Our integrated suite of Kofax solutions has enabled us to revolutionize our timecard processing systems by making them much easier to use," said Jeff Stratton. "To do this, we created a mobile app, which allows our nurses to photograph and upload their timecards, select the type of work they're filing for, and submit a request for payment.

"Submitted timecards then go through our network, where they are processed through our Kofax system quickly and efficiently. These smart software robots determine which type of work is being billed, and then route it through to the appropriate teams for processing. This approach is far more efficient than our previous system and dramatically reduces the risk of human error.

"We use Kofax RPA at the front end of the process to help get our clinicians working in a healthcare delivery system faster. Validating qualifications requires a lot of document verification and processing. We found quick wins with Kofax RPA by automating high volume process steps. Timeliness and accuracy are now maximized, and our support staff can focus on shoring up other process areas."

But AMN Healthcare may not have been able to realize these benefits so dramatically without the help of its business partner, Genus Technologies.

"We initially had some difficulty realizing the potential of the Kofax platform," said Jeff Stratton. "But once Genus Technologies came on board to help us with the implementation, we were able to complete the project with zero critical production issues. That



"With the Kofax solution, we can rely on near-zero errors in our data entry and processing, which creates peace of mind for us and for our contractors."

Jeff Stratton, Senior Project Manager,
AMN Healthcare

is nothing short of phenomenal, but it was no surprise to us. Genus Technologies is well known for the professionalism and diligence of its team, and we are proud to have them as our long-term partner for all things Kofax.”

AMN Healthcare also mobilizes the analytics capabilities delivered by its Kofax solutions to drill down into the work that contractors have filed previously, build a clearer picture of their needs, and offer them the most relevant opportunities.

“AMN receives timecards continually and managing the production cycle can be a big challenge. We use Kofax Analytics for TotalAgilty to glean insights into that cycle. We have dashboards and reports that allow us to understand the flow of documents and to set priorities for the support teams. We have a much better understanding today of where timecards are coming from, when we’re receiving them, and where they are in the process than we did in years past. This has been a significant transformation for the shared services group.”

knock-on quality of life improvement for some of the busiest workers in our country.”

AMN Healthcare has also gained a greater understanding of its clinicians’ data thanks to the Kofax solution. “The risk of duplicating data is now much lower, because the software robots embedded in the Kofax solutions spot and resolve mistakes automatically,” said Jeff Stratton. “The risk of lost timecards and missed payments is now almost completely eliminated, which is great for our contractors as it ensures they get paid on time. With the Kofax solution, we can rely on near-zero errors in our data entry and processing, which creates peace of mind both for us and for our contractors.”

Jeff Stratton concluded: “We have experienced 100% system uptime since adopting the Kofax solution, and the response from our internal staff has been very enthusiastic as a result. Thanks to Kofax RPA, as well as the top-notch support of Genus Technologies, we can now easily direct our staff to better opportunities, and more efficiently too—helping them maintain a steady record of employment and encouraging them to keep working with us to deliver life changing healthcare services.”



Results

After adopting RPA solutions from Kofax, AMN Healthcare has significantly reduced the amount of time spent processing contractors’ timecards, while also reducing the risk of error.

“Since adopting Kofax solutions, we have reduced the time spent processing timecards by up to 68%, cutting the number of man hours required to complete this task from 8,000 to just 2,600,” said Jeff Stratton. “This frees our staff to focus on more value-add tasks and reduces the need for them to work overtime to file administration, generating a

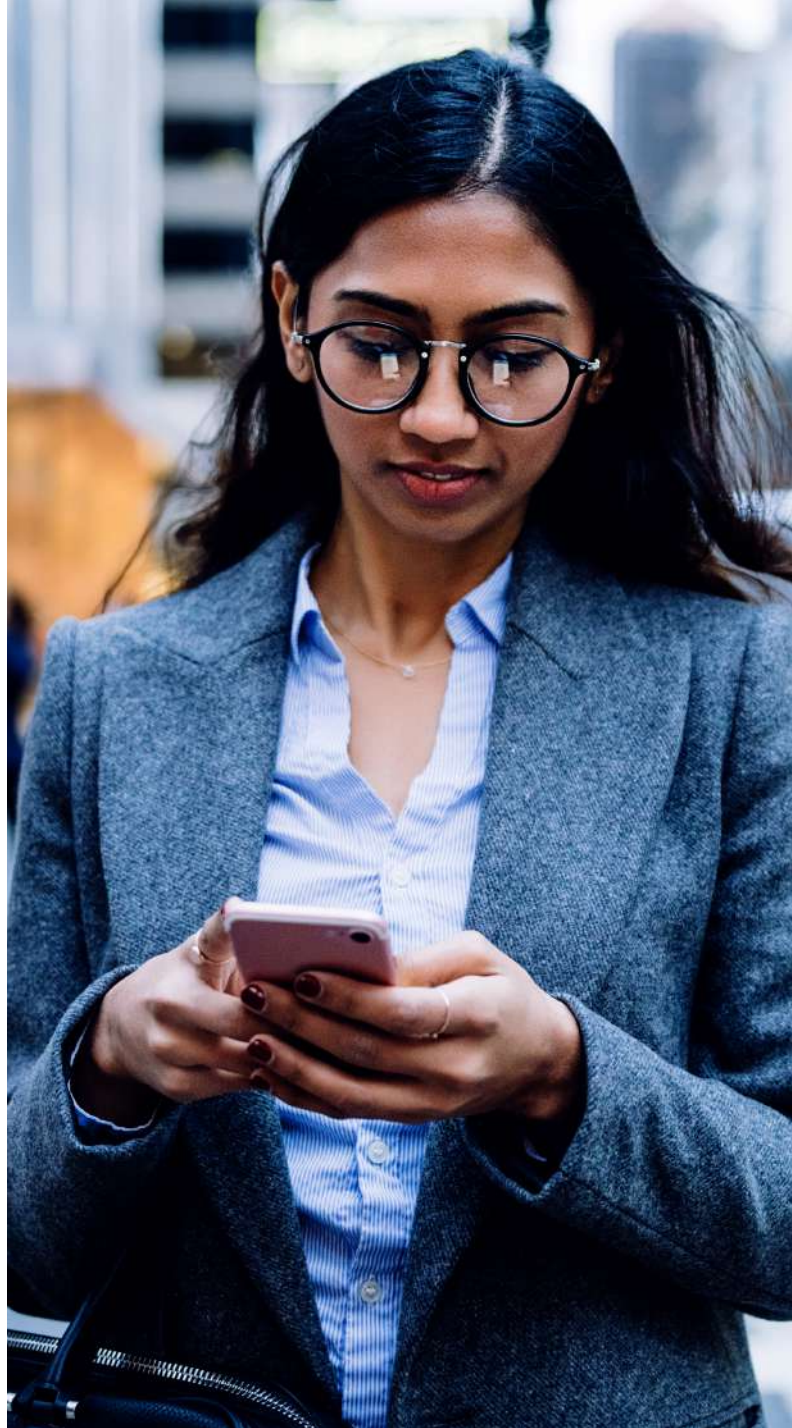
South African Bank Leads the Way to Greater Financial Inclusion with Mobile Customer Onboarding App

This South African bank is disrupting the market with an innovative mobile app for onboarding customers, driven by Kofax capture technology. By enabling customers to apply for an account on the go—without having to visit a branch—the bank has increased new account openings by 50 percent, growing market share and boosting financial inclusion.

Challenge

In South Africa, lack of convenient access to banking services has long been a barrier to financial inclusion, especially among the country's poorer citizens. An estimated 23.5 percent of the population do not hold a bank account, and R12bn (\$1.04bn) in cash is believed to be held outside of banks nationwide.

One of the country's major banks recognized the problem and set about finding a solution, as a spokesperson explained: "Many people live miles away from their nearest bank and lack easy access to transportation. If they want to open an account, they can't feasibly visit a branch within the opening hours, which are typically 9 a.m. to 3 p.m. And for those people who are able to visit a branch, it can often take two to three trips to complete the account opening, as customers don't always have all the necessary documentation to hand on their first visit. Between these two challenges, we found that around 70 percent of customers who initiated an account opening failed to complete the process.



"By bringing banking to more South Africans, we are doing our part to improve their economic outlook and strengthen the wider economy, which helps build brighter financial futures for all."

Spokesperson, South African Bank

One of South Africa’s leading banks, this company provides personal, private, business, commercial and corporate banking services to millions of people across the country.

PRODUCTS

Kofax Capture™
Kofax Mobile Capture SDK™
Kofax SignDoc®
Kofax Transformation™

FOCUS

Customer Onboarding

“We saw that there was a huge opportunity for us to win more customers if we could provide a quick, convenient way of opening a bank account. And once customers had been onboarded, we wanted to ensure that they could easily access all the subsequent services they might need—helping us maintain high levels of satisfaction and retention.”

Solution

The bank built a powerful mobile customer onboarding app, based on Kofax solutions, that allows its representatives to capture all the information needed to open a bank account from a mobile device.

“We selected Kofax because we felt that it offered the most complete and flexible document capture capabilities,” noted the spokesperson. “Our mobile development team has given us positive feedback about the Kofax solutions, and it was very quick and easy for them to build the capture platform for our mobile app.”

The Kofax mobile capture technology converts the mobile device in the palm of the customer’s hand into a virtual scanner. The capture software controls the focus, flash and shutter of the device to ensure each image is captured correctly the first time. The technology automatically de-skews the image, separates it from the background and removes artifacts, such as shadows. This process greatly improves data extraction accuracy, as well as image quality.

When the mobile onboarding app was ready, the bank hired around 300 independent sales representatives and posted them in urban areas with high foot-traffic, such as taxi ranks, where many people congregate to travel home at the end of the day. If a customer wishes to open an account at one of these mobile sales points, he or she simply has to provide a few key documents, including an identity document, proof of residence and proof of employment, and the sales rep helps them complete the application on a smartphone or tablet using the new mobile app.

The app captures the documents and then uploads them to back-end systems for processing. The customer is given a bank card on the spot, and once his or her application has been processed and approved (usually within a few working days), the bank sends an SMS notifying the customer that their account is set up and ready to use.

“We are bringing the bank to our customers,” said a spokesperson. “By establishing mobile sales points in locations that potential customers already frequent, we are both boosting visibility of our brand and making our services more accessible than ever before.”

In a separate use case, the bank also takes advantage of Kofax SignDoc to verify signatures on checks and credit cards.

“Kofax SignDoc has transformed what was once a timeconsuming and resource-intensive manual task into a highly automated, accurate process,” stated the spokesperson. “It has helped us to minimize the risk of check and credit card fraud while keeping operating costs low.”




Results

The mobile customer onboarding app has revolutionized the account opening process for this bank. By providing customers with a quick and easy way to open a bank account—at a time and place that suits their lifestyle—the bank has dramatically increased new customer acquisition rates.

The spokesperson remarked: “More people are choosing to bank with us than ever before. And crucially, those who start the account opening process are much more likely to see it through to completion. In the past, only 30 percent of people who applied for a bank account completed the process; today, that figure has risen to 80 percent. This growth has translated into greater revenues and market share, strengthening our competitiveness.”

By taking advantage of advanced mobile technology to shape better experiences in those first moments of customer interaction, the bank has bolstered its reputation as an innovator that is committed to its customers.



“We have built our success on being there for our customers at every stage in their financial journey, and investing in innovative services like the mobile onboarding app helps us to continue delivering experiences that improve people’s lives. By bringing banking to more South Africans, we are doing our part to improve their economic outlook and strengthen the wider economy, which helps build brighter financial futures for all.”

Spokesperson, South African Bank

Safe-Guard Products Adjudicates Claims 75% Faster with Kofax

Safe-Guard Products uses Kofax solutions to revolutionize how it manages millions of contracts and thousands of claims, reducing adjudication times by more than 75%, boosting productivity by 30% and improving customer satisfaction by 15%.

Challenge

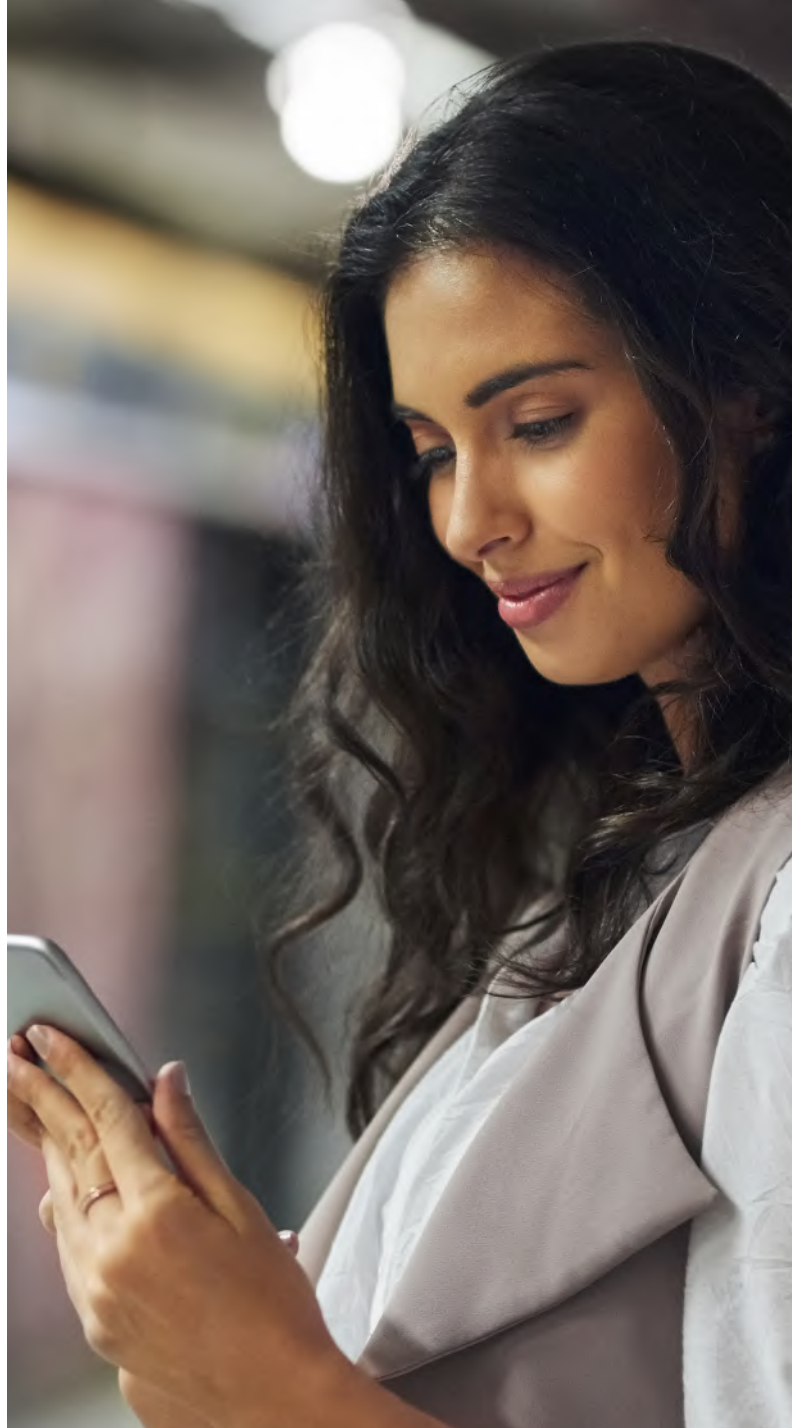
Every year, Safe-Guard processes more than two million contracts and thousands of claims. Whether a customer is purchasing a product or filing a claim, the company must ensure a prompt response—or risk damaging customer satisfaction and potentially losing valuable business to more agile competitors.

“We’re here to help our customers when they need us,” said Tim Dewey, Vice President of Operations Technology at Safe-Guard. “To achieve this vision, we need to keep customers informed at every stage of their insurance journey and ensure that their requests are dealt with in a timely, accurate manner.”

With its rapid business growth, Safe-Guard recognized a need to move beyond traditionally high-touch, paper-based processes if it was to meet customer expectations for prompt service.

“We sell a large proportion of finance and insurance products through car dealerships, which routinely rely on pen and paper,” Dewey said. “Claims processing was a similarly paper-heavy process. In each of those areas we have to collect a significant amount of documentation from external stakeholders and customers. Our administrative teams spent considerable time and effort scanning and processing hardcopy documents, as well as reviewing and sorting email attachments into folders.”

Safe-Guard realized that it had a valuable opportunity to transform the sales and claims process into a more efficient, streamlined experience.



“We saw an opportunity to use Kofax products to streamline a number of processes and eliminate redundant work, which would allow us to respond much faster to customers.”

Tim Dewey, Vice President of Operations
Technology, Safe-Guard

SAFE-GUARD

Products International, LLC

ABOUT SAFE-GUARD
WWW.SAFE-GUARDPRODUCTS.COM

Safe-Guard delivers products to the motor vehicle industry. Its products are sold at more than 10,000 dealerships across North America.

PRODUCTS

- Kofax RPA™
- Kofax TotalAgility®
- Kofax Analytics for TotalAgility™
- Kofax Mobile Capture Platform™
- Kofax Mobile SDK™
- Kofax Transformation™

FOCUS

- Cognitive Capture
- Customer Onboarding
- Claims Processing
- Intelligent Automation
- Web Data Extraction
- Robotic Process Automation
- Process Intelligence
- Customer Self-Service

“We wanted to eliminate any sticking-points in the customer journey that could cause contract and claims requests to be delayed,” he added. “The key to achieving this was to reduce the amount of paper and number of touch-points, as well as eliminating redundant process steps. We also wanted to engage more deeply with our customers, keeping them up-to-date throughout the sales and claims lifecycle and providing them with more convenient access to the services they required.”

Solution

Safe-Guard selected a suite of document and business process management solutions from Kofax to turn its ambitious vision into reality.

“We recognized that if we could provide greater transparency and efficiency in our initial engagement with a customer, we could deliver a higher-quality experience,” Dewey said.

As a first step, Safe-Guard set out to automate the contract and claims submission process and reduce the number of times a single document is handled by an employee. The company automated the capture of paper documents, scanning them directly to a KofaxTotalAgility document management solution without manual intervention. Similarly, documents received by email and fax are also flowed directly through to TotalAgility, producing a single, central information store.

Regardless of how a document enters the system—by mail, fax or email—it is identified by document type and sent to a work queue that matches it to an existing claim or contract. Next, each document goes through an extraction process that identifies and stores any pertinent data.

To deliver a further boost to efficiency, Safe-Guard worked to track each step in the contract and claims handling process to identify areas for improvement, using Kofax Analytics for TotalAgility.

“With Analytics for TotalAgility, we were able to establish key metrics, such as how long each step took, who touched each document and how many times, the number of documents classified in each batch, the average time per classification, and so on,” remarked Dewey. “Tracking these metrics provides us with two opportunities: one is to recognize the superstars, and the other is to work with people who aren’t as efficient to help improve their performance. With the new insight, we can take steps to improve processing efficiency even further.”

Improving The Customer Experience

Beyond optimizing behind-the-scenes processes, Safe-Guard is also enhancing the front-end customer experience. Today, it provides customers with regular updates on the status of their pending claim or contract application, along with other communications, including “how can we help” notices—all of which help to keep customers informed and put them at ease.

On the claims side, Safe-Guard is working to launch a web portal that will offer customers up-to-the-minute insight into the status of their claim. They will also be able to view which documents are required to complete a claim and upload them directly. Documents submitted via the web portal will be processed through TotalAgility as if they had been sent through traditional channels.

What’s more, Safe-Guard plans to extend this self-service functionality to a range of devices, using a new mobile app built on Kofax Mobile Capture Platform and the Kofax Mobile SDK. With the mobile app, customers will be able to take photographs of claims-related documents using a smartphone or tablet and securely share them with the provider for processing. Safe-Guard anticipates that this will significantly accelerate the claims cycle and empower customers with a more convenient way of submitting claims.

“Kofax Mobile Capture does a lot more than just capture a picture; it reduces the file size, synthesizes the data and brings it all into our system automatically,” said Dewey. “With Kofax solutions underpinning our mobile app, we can put new capabilities directly into our customers’ hands and help them access the services they need anytime and anywhere—boosting satisfaction and loyalty.”

Accelerating The Payment Process

An important step in the claims payment process is evaluation of the claim itself. Before a claim can be paid, Safe-Guard must quantify the value of the customer’s loss. That process involves numerous steps. An adjuster reviewed every one of the required 14 claims documents to locate the relevant information and then manually copied and pasted it to a new document. At the same time, the adjuster researched websites such as Kelly Blue Book (KBB) and the National Automobile Dealers Association (NADA) for corresponding information, and

“With Kofax solutions underpinning our mobile app, we can put new capabilities directly into our customers’ hands and help them access the services they need anytime and anywhere—boosting satisfaction and loyalty.”

Tim Dewey, Vice President of Operations Technology,
Safe-Guard

again copied and pasted that information into the same new document. This document was then summarized and entered into a contract management site. Safe-Guard employed 20 adjusters who did nothing else but work through this process for every claim.

Many of these manual steps are now automated with the new system. TotalAgility extracts 86 data points from the 14 claims documents, eliminating the need for assessors to manually review them. Safe-Guard then uses Kofax RPA to perform two separate tasks:

1. automatically pull the 86 data points into a centralized document and
2. go out to websites like KBB and NADA and extract any vehicle data and vehicle information related to the claim.

“Having Kofax RPA automatically scrape information from those sites allows us to move the claim through the adjudication process much more efficiently,” according to Dewey. “Kofax RPA is a critical product for us.”

Kofax RPA validates the amount that should be paid on the claim and then populates the data into a proprietary contract management system—moving it to a payment status and eliminating yet another manual step. The claim is then routed to Safe-Guard’s accounting and finance department to print the check. With TotalAgility and Kofax RPA, the process from claim submission to payment is not only faster but more accurate. “I like to say that Kofax RPA makes it all happen ‘automagically,’” he said.



Results

The new approach to contract and claims processing has delivered significant benefits. Document capture has been transformed into a fast, low-touch activity, helping Safe-Guard handle contract- and claims-related documentation more efficiently than ever before.


“In the past, document capture alone used to take up to two hours a day; now it takes just 10 to 15 minutes. And during this process, documents used to be handled by an operator three to five times. Today, they’re touched just once—a reduction of up to 80%.”

In addition, Safe-Guard estimates that the new solutions will reduce the time to adjudicate a claim by at least 75%, as Dewey added, “This will help us to accelerate the end- to-end claims life cycle, from submission to payment. If all the relevant claims documents are submitted to us by 2:00 p.m., we could release and send a check by noon the next business day.”

By automating and streamlining processes, Safe-Guard staff can handle growing volumes of work more easily, increasing productivity of the claims processing team by approximately 30%.

The newfound efficiencies have allowed Safe-Guard to run a much leaner team, even as its business continues to grow. At one point, Safe-Guard assigned just under 50 full-time employees to manage the paperwork related to contract and claims processing. They expect to cut that number in half, showing a return on their investment in less than 18 months.

Equally important, the new approach is already having a positive impact on customer service levels. Safe-Guard estimates that it has achieved a 25% reduction in the number of calls from customers checking on the status of their contract or claim, and customer satisfaction scores have increased by 15%.



“The ability to digitize and streamline many aspects of customer interaction, from contract purchase to claims submission and management, will make it that much easier for customers to do business with us. This will help us increase satisfaction and loyalty, and gain a valuable edge on competitors. We consider our investment in Kofax solutions to be a game-changing differentiator in the marketplace.”

Tim Dewey, Vice President of Operations Technology,
Safe-Guard

Brazil-based Highway Management Company Builds Shared Services Center on Intelligent Process Automation and Analytics

Brazil-based highway management company Arteris has built a shared services center on intelligent business process automation and analytics solutions from Kofax and TR Process. Shared services teams can count on streamlined, digitized processes and rich analytical insight to deliver support for key business services quickly, reliably and efficiently—driving down costs and helping Arteris pave the way to profitable growth.

Challenge

As a company grows larger, adopting a shared services model can offer valuable benefits: lower costs, improved quality control, and enhanced service levels. With its market-leading business growing from strength-to-strength, Arteris—Brazil's largest toll road operator—determined that the time was right to make the move to a shared model for delivering back-office services.

Márcio Rogério de Lima, IT Manager at Arteris, explained: “We are owned by Abertis—the world leader in toll road management—which has been championing shared services initiatives at its subsidiaries to unlock efficiencies and standardize on best practices. As a large company, operating nine different concessionaires, we recognized that we stood to gain significant value by consolidating administrative and accounting services such as accounts payable and



“With shared services underpinned by solutions from Kofax and TR Process, we can deliver very agile, cost-effective and high-quality support to the business, helping Arteris run in a more productive and profitable way.”

Márcio Rogério de Lima, IT Manager, Arteris



Founded in 1998, Arteris operates and maintains more than 3,250km of highways in Brazil. The company owns nine concessionaires that are responsible for the maintenance and operation of roads, toll collection and construction services. Based in São Paulo, Arteris has been controlled since 2012 by Participes en Brasil, a joint venture of Abertis Infraestructuras and Brookfield Motorways Holdings SRL.

PRODUCTS

Kofax Insight™
Kofax TotalAgility®

FOCUS

Accounts payable automation

PARTNER

TR Process

receivable, records management and reporting. Moving these functions out of individual companies into a Shared Services Center [SSC] would help optimize our use of resources, reduce costs and deliver more consistent, high-quality services.”

While the shared services model offered clear advantages for Arteris, it also created new challenges.

Márcio Rogério de Lima continued: “As we moved back-office functions out of individual companies, we would also be removing the specialist knowledge that teams had about each company’s unique processes and ways of working. While an SSC could operate more efficiently, its people wouldn’t automatically have the same awareness of the ins-and-outs of different group companies.

“To make the SSC a success, we needed to arm teams with deep insight into service-level agreements, key performance indicators and other metrics that would allow them to understand what is happening with each company from the get-go. Armed with this information, operations staff would be able to work accurately and productively, and management would be able to make informed decisions about how best to optimize processes and deliver top-quality services.”

Solution

To underpin its new SSC, Arteris worked with long standing partner TR Process to design a smart process application and analytics platform, built on KofaxTotalAgility, Kofax Insight and TR Process Smart Process Applications.

“Our shared services project builds on several years of investment in technology from Kofax and TR Process,” commented Márcio Rogério de Lima. “We originally introduced KofaxTotalAgility to automate invoice processing, then recently extended the solution to cover our entire accounts payable area.

“Having gained first-hand experience of KofaxTotalAgility during these projects, we recognized that it gave us an ideal foundation for our new shared services initiative. And we decided to introduce Kofax Insight as it would enable us to integrate data from multiple sources—not only KofaxTotalAgility, but other strategic enterprise applications such as Microsoft SharePoint and SAP ERP—and analyze it from a single platform.”

Driving a successful implementation

Alongside the deployment of its suite of Kofax and TR Process solutions, Arteris worked simultaneously to optimize its existing accounts payable processes to meet the demands of the SSC—configuring around 100 new processes. The company successfully completed all this work and got the SSC up and running in less than five months.

Márcio Rogério de Lima said: “This project has gone very smoothly, and credit for that has to go to the excellent support provided by TR Process. Their expertise helped us to ensure that the new

environment was properly configured and deployed, and they were right there with us at every step along the way making sure that we stayed on track.

“It also helped that we were building on a very well-designed and tightly integrated set of Kofax solutions. Extending our KofaxTotalAgility landscape was a seamless process, and rolling out Kofax Insight was very quick and easy.”

He added: “The fact that we have gone live with the SSC in just under five months is a great accomplishment, and I think it has far exceeded all our expectations. With a change of this magnitude, we were expecting to have some problems to iron out, especially at the beginning, but we have hit the ground running. The platform has been working well from day one, and our users were quick to embrace the new approach.

“Our success has not gone unnoticed either—our executives and other Abertis group companies are taking note. In fact, there is one organization manager at another Abertis subsidiary who is planning to replicate our work at his own company, and use us as a reference for best practices, because of how well this project has gone.”

Newfound insights

Today, solutions from Kofax and TR Process are driving highly digitized, automated processes in the SSC at Arteris, and giving teams deep visibility into end-to-end operations. The company relies on Kofax Insight to easily monitor and analyze processes and keep shared services operations running efficiently.

“Kofax Insight gives us a powerful tool for capturing data from all our business processes and using the information to optimize our workflows,” noted Márcio Rogério de Lima. “We actually started taking advantage of the Kofax solution before we officially went live with the new platform to check that the new processes we had configured were all functioning properly. Thanks to the insights we gained, we were able to make improvements to certain workflows and fix issues. This meant that when the new platform went into production,

everything ran smoothly and our users were able to get down to work right away.”

Not content to rest on its success, Arteris is already looking to take the next step in its business process transformation. Márcio Rogério de Lima commented: “The work we are doing now is paving the way for even greater automation. Soon, we plan to take advantage of Kofax RPA to automate even more of our business processes—freeing our staff from repetitive tasks, eliminating the risk of human error and enabling more accurate and reliable process outcomes.”



Results

Moving core business support services to a shared center is helping Arteris to achieve valuable efficiencies through greater economies of scale. The company estimates that it has halved the size of the workforce supporting its key business services. What’s more, the company believes its center is running with a workforce that is 40 percent smaller than other comparable SSCs in the Brazilian market handling similar volumes of work.

The new approach is also helping Arteris to ensure that critical financial processes, such as month-end closing and supplier invoicing, are completed in a timely and accurate manner.

Márcio Rogério de Lima explained: “Since introducing the SSC we have been able to complete month-end closing much faster—a benefit we had not anticipated. Usually when a company performs this kind of centralization and changes processes, it takes a few months for everything to stabilize, so financial consolidation can be a bit of a nightmare in the first few months of following the new approach. For us, it was exactly the opposite: in the first month after we went live with the SSC, we closed our books well ahead of our deadline, and only needed to reprocess seven documents. And by the second month, we finished month-end closing ahead of schedule once again, with zero issues and no need for re-work.”

He continued: “It’s been the same story for processes across the board—Kofax solutions are

helping our shared services teams to work in a very controlled and efficient way. Take accounts payable, for example, which is arguably the most critical function in our company. We handle a huge volume of invoices every month; many of these are for very large amounts of money and are linked to very important contracts with government bodies. We can't risk making any errors or late payments as these could potentially jeopardize our public-sector contracts. With Kofax solutions driving streamlined, accurate invoice processing, we can make sure that our suppliers are paid on time—helping us maintain good working relationships with vendors and keeping vital civil works on track.”

On the road to success

Crucially, Arteris has gained the end-to-end process visibility it needs to ensure that operations at the SSC run in the most effective way.

Márcio Rogério de Lima stated: “The clear traceability and understanding that Kofax Insight provides across all our business processes is very important to us. We have nine different operating entities, all scattered across the country and generating very large volumes of information, so keeping a close watch on content and processes is a must for us. Thanks to the analytical insight that Kofax delivers, we can track how documents move through our systems and how our people are working from the very first interactions right through to the end.

“With this kind of traceability we can pinpoint where bottlenecks or quality issues are occurring, and take targeted action to speed up and refine operations. Similarly, we can see if certain employees are making repeated mistakes or taking longer than normal to handle certain tasks, and provide additional training or guidance to help them work more effectively. By making better-informed decisions about how to best manage our processes and people, we are helping Arteris to run more cost-effectively, productively and with better governance.”

He concluded: “One of the most important benefits that our new approach gives us is complete confidence in our end-to-end processes. Everything is digitized, highly automated and totally traceable—and we are constantly refining our delivery model to unlock even greater efficiencies. With shared services underpinned by solutions from Kofax and TR Process, we can deliver very agile, cost-effective and high-quality support to the business, helping Arteris run in a more productive and profitable way.”

“One of the most important benefits that our new approach gives us is complete confidence in our end-to-end processes. Everything is digitized, highly automated and totally traceable.”

Márcio Rogério de Lima, IT Manager, Arteris

Large European Insurer Cuts Claims Processing Times by 80% and Frees Staff for Value-Add Tasks

A major European insurance company wanted to reduce the time it spent processing medical investigation reports. To reduce the workload of its claims teams, the company deployed Kofax TotalAgility®. The solution cuts report processing times by 80% and frees up staff to focus on more value-add tasks.




Challenge

A key part of working on a claims team at an insurance company is reading and digesting the large quantities of information contained in investigative reports as quickly as possible.

A European insurance company wanted to make this process faster and more efficient. A spokesperson for the European insurance company explained: "Every day, I receive a huge number of medical investigative reports, which serve as the first step to establishing the validity of a claim and the potential financial outcome for the claimant. These reports are usually 12-15 pages long. Reading and distilling the information that is relevant to me usually takes about 50 minutes – a time-consuming process."

As the team was processing so many claims on a daily basis, a level of variation and human error naturally affected claimant outcomes. Two team members might read very similar claims slightly differently, which could impact payouts. The company determined that a more standardized process might help boost efficiency.



"We selected Kofax TotalAgility because the solution outshone its competitors with its impressive track record. The Kofax team really showed their dedication and expertise by creating a proof-of-concept in just three weeks."

Spokesperson. European Insurance Company

PRODUCTS

Kofax TotalAgility®

FOCUS

Insurance: Claim Form Processing

Medical Reports Processing

Cognitive Capture

Digital Transformation

To increase operational efficiency and standardize processing, the European insurance company wanted an optical character recognition (OCR) solution that would cut the time needed to process reports and accelerate accurate decision-making on claims.

Solution

The European insurance company conducted a thorough review of automatic OCR options from leading vendors, before settling on the Kofax TotalAgility solution. The spokesperson recalled: “We selected Kofax TotalAgility because the solution outshone its competitors with its impressive track record. Moreover, the Kofax team really showed their dedication and expertise by creating a proof-of-concept (POC) in just three weeks – far quicker than the other vendors we engaged.”

Kofax and the European insurance company built a simple POC, running a small number of documents through the TotalAgility system to test the ability of the solution to recognize the different templates the insurance company uses.

Following the successful POC, the European insurance company moved onto more complex, demanding assessments, to uncover the solution’s suitability for its business needs.

Whereas previously, an employee would read a report and identify information manually, now Kofax TotalAgility scans each document and extracts the relevant data automatically. This data is then ready for use by the European insurance company’s customer-facing employees, much quicker than was previously possible.

The spokesperson commented: “When we initially rolled out the solution, we got excellent feedback from our front-line colleagues – they felt that TotalAgility made their jobs easier, because the information they received was presented in a much simpler way than previously.”

As an open platform, Kofax TotalAgility integrates with other capabilities; in this case, an analytics solution that analyzes patterns and trends within the data it processes, to facilitate investigations of fraud and malpractice. This enables the company to safeguard itself even more effectively from fraudulent activity.

The spokesperson continued: “The solution enables us to capture data on a scale we’ve never achieved before, that we can then run analytics on. Even though it wasn’t the primary business need that led us to implementing TotalAgility, the cognitive capture that TotalAgility provides is an extremely useful function that adds real value to our work.”

“We’ve redeployed 15 employees from our claims processing department to other areas of the business that require more creative or strategic work, which represents a major efficiency saving for us.”

Spokesperson, European Insurance Company

Results

Implementing Kofax TotalAgility has enabled the European insurance company to unlock significant efficiencies. The company can now process claims much more quickly and in a standardized manner – ensuring each claim receives the same treatment.

The spokesperson explained: “TotalAgility has enabled us to cut our claims processing time from an average of 50 minutes per claim to just ten – a saving of 80%. We’ve also been able to run a much leaner team. We’ve redeployed 15 employees from our claims processing department to other areas of the business that require more creative or strategic work, which represents a major efficiency saving for us.

“More importantly, the standardization that TotalAgility provides ensures that all of the claims we work with are processed in exactly the same way, enabling us to significantly reduce the risk of human error.”

The European insurance company is currently using TotalAgility for claims processing in one location but plans to expand its use of the solution to a variety of regions across Europe and beyond.

The spokesperson concluded: “TotalAgility has helped us transform the way we process claims, feeding us structured information to enable deep insight into the vast quantities of data contained in the medical reports. We’re excited to continue working with the solution and keep exploring ways to boost our efficiency further.”

“The standardization that Kofax TotalAgility provides ensures that all of the claims we work with are processed in exactly the same way, enabling us to significantly reduce the risk of human error.”

Spokesperson, European Insurance Company



Next Steps

For more information on [Kofax Intelligent Automation](#)
or to request a demo, contact us at info@kofax.com
or give us a call at: +1 949.783.1333.

www.kofax.com

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